



Usability Report on the Primo New User Interface

Nir Zinger, Library Information Systems Analyst

Dr. Lynne Porat, Head Interlibrary Loans and Assessment, Younes and Soraya Nazarian Library

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Introduction

Prior to the launch of the new Primo user interface "OneSearch" as the default library discovery tool, the University of Haifa's Assessment Team conducted a usability test whose purpose was to examine usage patterns, ease of navigation, user experience, display of functions and information items, and the organization of the interface.

Nielsen's (2000)¹ recommendation to test no more than five users, giving each one a variety of tasks, influenced the decision to use a representative sample of three participants from each of the population groups (BA students, MA students and researchers). Instead of performing two rounds of tests (before and after the issues were fixed), participants were asked to explain their feelings, especially the negative ones, and describe what needed to be improved.

Method

In December 2017 an email invitation with an online registration form was sent to a representative sample of 2,000 students and faculty at the University of Haifa. A total of 15 people registered and 10 of them participated in three different sessions: three were academic staff (one from the Faculty of Management and two from Nursing), three were BA students (from Business Administration, Biology, and English Language & Literature), and four were MA students (from Hebrew Literature, Archeology, Philosophy, and Hebrew Language & Language).

They were asked to perform between five and nine tasks on the new Primo interface for a maximum of one hour. The "Think Aloud" method was utilized whereby their thoughts, comments and actions were recorded using screen recorder software. A member of the Assessment Team also wrote down their comments and assisted with problems.

¹ Nielsen, J. (2000). *Why you only need to test with 5 users title* Retrieved from <https://www.nngroup.com/articles/why-you-only-need-to-test-with-5-users/>



Results

1. General impressions of the interface:

The prevailing view was that the interface was friendly and suited to young users (students). Most participants were successful in locating information and performing a variety of tasks², and were satisfied with the indication that a task had been performed successfully/unsuccessfully. Most participants stated that the new UI was more convenient than the current interface, with only one preferring the current interface. Some of the participants noted that because this was their first experience with the new UI, the test questions provided a learning experience, and in future they would probably perform better.

a) Functions with positive feedback:

- Pleasant graphics: "It has clean lines", "It is simple and modern", "It is pleasant to the eye and calm"
- Convenient display of Location and bibliographical details on one screen
- Easy to Save items in List of Results and in Full Display
- Convenient to work with Facets and Advanced Search
- Easy to see status of Loans
- Interface response time (no complaints)

b) Functions performed successfully:

- Finding specific items
- Accessing the Full Details of an item from List of Results, using Get It and View It
- Changing the Language of the interface, entering "Your Account"
- Navigating within the list of results and Sorting them by Date or Title
- Filtering results using Facets
- Finding and using the Advanced Search
- Saving Items, Saving Searches, and Creating Alerts

2. Problems that arose during the assessment

² When participants felt that they were performing a particular task successfully, they praised the interface, but when they were not successful or when they felt insecure, they usually said that they needed to learn and get used to the interface.



The problems observed are divided into six categories with the number of participants who had difficulties shown in brackets. Each section has a list of recommendations for improvement, some of which are based on comments from the participants, and others are a result of observations and discussions with the various library teams. Not all the recommendations were implemented, mainly because some needed broader consideration. Several of the difficulties observed stemmed from a learning curve connected to the new interface, and others to the level of technological literacy and the degree of familiarity with library systems in general.

a) Spatial organization and navigation

- Too many functions and buttons on almost every screen
- Full Display covers the entire screen, including the main menu and the link to the personal area (1)
- Chat banner hides parts of the main menu, especially in Full Display such as the X button to go back to main menu (1)
- Main menu
 - o The "New Search" was not clearly displayed, so used the browser's Back or Esc button (2)
 - o Not clear that when searching for "Ejournals" should use "Books & more" (2)
 - o In the Advanced Search: the terms "Subject search & more" was not clear (1)
 - o Scopes such as Assessment Tools, University of Haifa IR were not used at all

Recommendations

- Create a uniform chat banner that will appear on both the library and Primo sites (in Hebrew and English) and will not hide any of the screens
- Move the "New Search" button to the left of the "National Catalog"
- Clarify that "Books & more" includes journals, ejournals, archives, pictures and collections
- Change "Subject search & more" in the Advanced Search to "Subject"

b) Personal Area, My Account, Login, Interface Language, Fines & Fees

- Difficult to find how to Log In (1)
- It is not clear that the List of Loans are arranged in chronological order by Due Date (1)



Recommendations:

- Increase or highlight the Personal Area by:
 - o Using different colors for the background and text and/or by using an icon of a person (male and female)
 - o Remove the Hebrew dictionary icon from the corner of the search bar to the main menu
- Indicate that the default display of Loans is by Due Date - from earliest to latest

c) Details, Get It and View It

- **List of Results**
 - o Confusing that in the old interface clicking on the Title only gives access to full text whereas in the new interface clicking anywhere on the record gives access (1)
 - o Too much text in the list of results, especially in theses and items with many authors (2)
 - o Clicking on the green View It button leads to the first vendor of several, even if it does not provide the requested volume (1)
 - o Expectation to see all volumes in the results list and to see a filtering option by year and volume as facets instead of in the Get It section (3)
- **Full Details**
 - o **View It:** The details about the journal holdings are not clear, because there are too many captions and numbers. In addition, the caption "Check Availability" which replaced "View Full Text" looks like a system error (2)
 - o **Get It:** Although it was easy to find the physical volumes of a journal using filtering, the information was too detailed and the screen was too full of text, (2)
 - o **Detailed information** It is difficult or impossible to find the original language of movies and the subtitle languages (7)
- **Requesting an item**
 - o All the participants chose from the "Loan Period" drop-down menu even though only one option was displayed and it isn't a mandatory field, possibly because this is more prominent than the Request button (6)



- o Participants asked "How do I know that a book has arrived at the Circulation Desk?" and "How do I check the status of a request in my account?" (2)

Recommendations:

- **List of results**

- o Reduce information about authors' dates of birth and death in the list of results, but display this information in the full display
- If more than one vendor provides access to an ejournal, clicking "Online Access" should lead to the one with the most relevant holdings

- **Full Display Information**

- o **View It**
 - Clarify which vendors have the issues e.g. Available from 1997 until 2015
 - For multiple vendors arrange the text in order of availability.
 - Change the caption "Check Availability" to "View Full Text" for local portfolios and to use the Interface Name in Alma for all other portfolios
- o **Get It** reduce information about physical items such as "Material Type"
- o **Detailed information** change the caption from "Language Note" to "Language/Subtitles" or use two separate fields

- **Requesting items**

- o If there is only one Loan Period, remove the requirement of selecting one
- o After placing a request, the text should state: "Request placed, you will be notified by email when it arrives. To check the status of your request, please check your library account. Your place in the queue is..."

d) Actions on search results (Saving Items and Queries, sending Email and Printing)

- None of the participants used Save Items or Queries for building a personal library
- None of the participants used the "My Recent Searches" button, apparently because there is only a link to it from the "My Saved Items" red pin. One participant said that the pin indicated "History".
- Performing actions on the results list
 - o Problem finding the pin to save an item (6)
 - o Pin used with ease from the list of results and under



"Share/Save"

- o Easily sent several articles by email from the list of results (4)
 - o Need clearer confirmation of successful saving (2)
- Saved Items
 - o Saved Items pin "moves from side to side" (1), however, another participant said he only found the red pin because it moved! (1)
 - o Expected to find the Saved Items in their account, or at least a link to them on this screen (2)
 - o When selecting All items could only select a maximum of ten items at a time, required reloading results and re-selecting (2)
 - o It is not clear that the numbers in the squares are meant to be selected (1)
 - o The bell is not defined as an Alert and is confused with RSS (2)
 - o Not clear that to send "Email & more" need to click Three dots (3)

Recommendations:

- Cancel the RSS button
- Remove the "My Last Searches" icon from the top bar as this function can be reached via the "My Saved Items" icon
- Perform actions on the list of results
 - o Add a pin button to Save queries in the "Share / Save" menu
 - o Highlight a record from the list of results and perform "Share / Save" actions
 - o Highlight the confirmation message once a search has been saved, highlight the text in your saved items, or move the message to the center of the screen
- Saved Items screen
 - o Add a link from the screen. Indicate that if you mark all the items on the page that there may be other items that have not been selected, and need to be reloaded to see the complete list and select all items
 - o Remove at least three items from the hidden menu of the three dots button so that they appear next to text on the screen List of results
 - o Highlight the three dots button when it is activated by color, size, background, etc.



e) Searching the catalog, and articles in Hebrew and English

- Did not understand what "Books & more" means (1)
- The text "What would do like to find?" does not look like a search box as there is already text there (1)
- The text "What would you like to find?" doesn't disappear when start entering a search term (2)
- Not clear that clicking on the magnifying glass actually performs the search (3) some pressed Enter after the search and others Enter on the autofill text
- The term "Title" in the Advanced Search does not disappear when you enter the search term (2)
- The pre-filter field "Words from Subject" was confusing because the other fields in the menu such as Title, Author did not have "Words from" before them (1)
- The term "Articles in English" is misleading as there are not only articles and they are not only in English (3)
- None of the participants found the Scope "Peer-reviewed journals" (5) all tried the Facets, two searched under the list of scopes (2)

Recommendations:

- Change the term "Books & more" to emphasize that it includes theses, videos, etc. Perhaps "Library Catalog" could be used without specifying any kind of material
- The text "What would you like to find?" in the "Type" command should be suppressed This also applies to Browse
- Change the "Title" in the Advanced Search to "Title / Journal Name"
- Change the terms "Words from Subject" to "Subject" like the other fields in the Advanced Search
- Remove as many as possible of the Scopes:
 - o Create a facet for "Hebrew Articles" and "Collections"
 - o Use Scopes only for Catalogs that are not included in the default library catalog or
 - o Use the Resource Recommender to ensure that the archives will be included



- o Use the Resource Recommender to display the information about the journals in the "Index to Hebrew Periodicals"

f) Limiting list of results in advance or reduce the results obtained

- Not clear that need to press the green button to select the Facets (3)
- Not clear the need to choose the value of the Facet and not the checkboxes, two subjects complained that selecting and press the green button required two actions instead of one (9)
- Lack of success in choosing the Creation Date (2)
- Not clear if MAs in Haifa were included in MAs in general (1)
- Not clear what the difference is between "Videotapes" and "Video Recordings" (2)
- Expected pre-filters in the Advanced Search to appear above the Facets (3)
- Most preferred to use Facets and not the Advanced Search (4) One person preferred the Advanced Search because of the Pre-filters (1)

Recommendations:

- Remove checkboxes and use "mouse over" on Facet values
- Use a slider on the "Creation Date" Facet and change term to "Publication Date"
- Change the terminology of theses and videos so that the hierarchy is clear
- Display the "Narrowed By" above the Facets in the Advanced Search

Summary and Recommendations

Most participants' overall impressions were positive, especially regarding the interface, its organization and the ease of use of Facets, Personal Area and Searching. However, there were a variety of problems. As with any new interface or system, it takes time to learn how to use, especially the advanced functions. In addition, individual differences such as technological and information literacy were found to be very important.

The findings were discussed with the Assessment Team, the Alma-Primo Team and Department Heads. In addition, the Library Information Systems Department discussed possible solutions with Ex Libris.



Appendices

A. Implementation of Recommendations:

1. Spatial organization and navigation

- Chat banner appears in same position in all library systems (website, Primo, EDS)
- Moved "New Search" button to before "ULI"
- Removed "Electronic Journals" button

2. Changed "Subject Search & more" to "Subject"

3. Personal Area

- Replaced "Personal Area" with a clear icon
- Loans displayed by Due Date" as default - from earliest to latest

4. Details of Records

- **List of Results**
 - Clicking on "Online Access" opens only one vendor
 - Removed authors' DOBs from the list of results, but leave it in the Full Display
- **View It**
 - Changed text from "Check availability" to "View Fulltext" for e-books and other materials (theses etc.)
 - Removed "Comment" field when only "Fulltext" is displayed
 - Added range of years to the local Portfolios
- **Get It**
- Changed color of barcode to gray
- **Detailed information**
 - Changed display of fields: Video, Language, Language of Subtitles
- **Requesting items**
 - "Loan Period" displayed only if there is more than one option to choose from, or if only one it is already selected by default
 - Changed the confirmation text on the request screen

5. Actions on the search results

- Removed "My Last Searches" button



- Add a pin to save an entry into the 'Share / Save' menu instead of the pin in the screen corner of the full record details
- Enable "Share / Save of multiple records directly from the list of results
- Highlight the confirmation message on Save Search, and highlight the text "My Saved Items"
- Removed the RSS button
- Add a link from the personal account screen to the saved items screen
- Indicate that there are other searches that were not selected when saving results from a list or in recent searches
- Highlight the three-point button when active (color, size, background) or work to remove at least three items from the hidden menu next to the title

6. Performing searches

- Removed "Type your search term" and "What would you like to find?" from search boxes
- Changed term from "Title" to "Title / Journal Title" on the "Browse by Subject" screen
- Changed the term "Words form Subject" to "Subject" on the "Browse by Subject" screen
- Use the Resource Recommender to flood information about journals in IHP and then remove it from Scopes
- Combined the Scopes of a daily newspaper into a single scope
- Created Facets based on types of journals: academic, refereed, research, professional
- Canceled Scope "Full text only" as Facet "Online Access" is enough

7. Limiting pre-filter checkboxes

- Switching to the default interface - displaying the boxes with the mouse over the Facet values
- Insert a Date slider
- Changed the Facet "Theses" to "MA and PhD theses"
- Change terminology for Videos
- Displayed "Narrowed Searches" in the Advanced Search above the Facets



B. Text explanation for participants

Hello and welcome to the Usability Test of the library's search system.

Our aim is to test how the system is navigated and how user-friendly it is.

Please describe aloud everything you do, or try to do (including your thinking process), the dilemmas and problems you encounter, your experience and the impressions you get from using the system.

In addition to recording everything you say, we will record everything you type, the screen, and your mouse movements.

We will not intervene unless we notice a problem of time, and then we will ask you to move on to the next task. We emphasize that the object of the test is the system - not you, or your search skills.

Thank you for your cooperation.



C. Questionnaire: First version

First task

1. Find the book "Fictions" by Borges
2. Where would you find the book in the library? What details do you need to find it on the shelf?
3. Find the video recording of the play "Fictions" by Pasolini
4. Save it for future use
5. Change the interface language to English
6. How can you identify the items you saved in the results list?
7. Save for future reference the "Red Notebook" listed below in the list of results
8. Change the interface language to Hebrew. Cancel saving the "Red Notebook"
9. Send the item information you saved to your email address

Was the experience positive or negative? Why? Please comment on the display and organization of the interface

Second task

1. Find three books in Hebrew related to the topic "chapters in the work of the historian"
2. Save search
3. Email yourself the details of the book "Apologie pour l'histoire, ou, metier d'historien"
4. What are the possible borrowing periods for the book "The Archeology of Knowledge"?
5. How many items are on loan to you in total?
6. What is the earliest date you must return one of the items?

Was the experience positive or negative? Why? Please comment on the display and organization of the interface

Third task

1. Find the video recording of the play "Hamlet" directed by Omri Nitzan, from 2005
2. How many of these items exist? What is the difference in format between them?
3. Find a 2014 movie in DVD format that begins with the word "Winter"
4. What is the source language of the movie you found? Does the film have subtitles?
5. Save your search



6. Search the subject "Children in the Kibbutz"
7. What are the two most recent items in this library?

Was the experience positive or negative? Why? Please comment on the display and organization of the interface

Fourth task

1. Find theses M.A. on the subject of "Russian Jewry"
2. How many of the theses you found are viewable online and how many are available for borrowing?
3. Save the search
4. How many searches have you saved so far?
5. Select one of your saved searches and set an alert for them to be emailed when new items appear on this search
6. How many searches are saved in your recent searches?
7. Select one of these searches and save it for future use

Was the experience positive or negative? Why? Please comment on the display and organization of the interface

Fifth task

1. Search for Hebrew articles related to the subject "Sexual harassment in the IDF" published after 2000
2. How many articles have you found?
3. Search for peer-reviewed articles on this subject
4. Send yourself by e-mail the article you found
5. Find the topic "Collective Memory" in the "2000" magazine

Was the experience positive or negative? Why? Please comment on the display and organization of the interface

Delete "My Last Searches" and "Saved Searches"

How often do you use Primo?

- ☐ I have never used the system



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צוות הערכה

- ☐ Once a month
- ☐ Number of times a month
- ☐ Number of times a week
- ☐ At least once a day

What is your primary use of Primo? (You can specify more than one answer)

- ☐ Never used the system
- ☐ Completion of teaching-research tasks
- ☐ Searching for information for: research seminar, research paper, essay writing, etc.
- ☐ Search for a specific item (s) or an item (s) on a particular subject

Thank you for your cooperation!

The Assessment Team, Younes and Soraya Nazarian Library, University of Haifa.



D. Questionnaire Second Version

First task

1. Find the book "Homesick" by Eshkol Nevo
2. Print the book details (no need to send to print, only to reach the print screen)
3. How many copies of the book are available for loan?
4. Order the book
5. Make sure the book is actually ordered
6. Cancel the order
7. Check whether you have fines or fees that you owe the library

Was the experience positive or negative? Why? Please comment on the display and organization of the interface

Second task

1. Find the video recording of the play Hamlet directed by Omri Nitzan since 2005.
2. How many of these items exist?
3. Find a 2014 movie in DVD format that begins with the word "Winter"
4. What is the original language of the movie you found?
5. Save your search
6. Perform a search on the subject "Children in the Kibbutz"
7. What are the two most recent items held by the library?

Was the experience positive or negative? Why? Please comment on the display and organization of the interface

Third task

1. Find MA theses on "Russian Jewry"
2. How many of the theses you found have online access and how many are available for borrowing?
3. Save the search
4. How many searches have you saved so far?
5. Select one of your saved searches and set a notification to be sent to you by e-mail when new items arrive



6. How many search queries are saved in your recent searches?
7. Select one of these queries and save it for future use

Was the experience positive or negative? Why? Please comment on the display and organization of the interface

Fourth task

1. Search only English language books with search words "Terror" and "France"
2. Did you find any items with online access? If so, what types of material?
3. Cancel the language restriction in your list of results
4. Did you find any items with online access?
5. Cancel the limitation by material type Books, in the list of results you received
6. Did you find any items with online access? If so, what types of material?

Start a new search, return to number (1) and perform the task using the "Advanced Search."

Was the experience positive or negative? Why? Please comment on the display and organization of the interface

Fifth task

1. Find the journal "Philosophical Quarterly"
2. Find a print article published in this journal in issue 60, 2011
3. Find the journal "Nature"
4. Is there online access to the issue that was published on November 30, 2017?
5. English articles on "USA Policy and Mexico Border"
6. Limit the results only to articles with online access from peer-reviewed journals
7. Find English articles on "Ideology in the Hebrew Language" published during the last year
8. Select three articles from the list received, and send the bibliographical details to your e-mail

Was the experience positive or negative? Why? Please comment on the display and organization of the interface



Delete: "My Last Searches" and "Saved Searches"

How often do you use OneSearch?

- ☐ I have never used the system
- ☐ Once a month
- ☐ Number of times a month
- ☐ Number of times a week
- ☐ At least once a day

What is your primary use of Primo? (You can specify more than one answer)

- ☐ Never used the system
- ☐ Completion of teaching-research tasks
- ☐ Searching for information for: research seminar, research paper, essay writing, etc.
- ☐ Search for a specific item (s) or an item (s) on a particular subject

Thank you for your cooperation!

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